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The Gender Equality Strategy and the Gender Equality Plan 2024-2026

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Abbreviations and definitions	
GE	Gender equality
GEP	Gender equality plan
HoD	Head of Department
HR	Human Resources
D	Director
SD	Scientific Director
SC	Scientific Council
CA	Chief Accountant
ISER	Institutul de Speologie “Emil Racoviță” “Emil Racovita” Speleological Institute
Sex	Either of the two major forms of individuals that occur in many species and that are distinguished respectively as female or male especially on the basis of their reproductive organs and structures (https://www.merriam-webster.com/dictionary/)
Gender	The behavioural, cultural, or psychological traits typically associated with one sex (https://www.merriam-webster.com/dictionary/)
Sex vs Gender	A clear delineation between sex and gender is typically prescribed, with sex as the preferred term for biological forms, and gender limited to its meanings involving behavioural, cultural, and psychological traits. In this dichotomy, the terms male and female relate only to biological forms (sex), while the terms masculine/masculinity, feminine/femininity, woman/girl, and man/boy relate only to psychological and sociocultural traits (gender) (https://www.merriam-webster.com/dictionary/)

INTRODUCTION

The Gender Equality (GE) strategy for 2022-2025 was developed by ISER on the basis of the input from the entire institute, taking into account everyone who works herein. The GE strategy was built on the provisions of the European Charter for researchers and of the Code of Conduct in the process of the recruitment of researchers 2015-2019¹, the European Gender Equality Strategy 2020-2025,² and the Horizon Europe guidance on gender equality plans³

The motivation for developing the GE strategy is to ensure that ISER is a safe place for everyone, and all activities and processes that take place respect the principles of equality, diversity, inclusiveness and non-discrimination.

Based on the GE strategy, ISER developed the GE Plan (GEP) for 2023-2026, with concrete actions and measures, as well as indicators for measuring progress of its implementation and revisions.

Enforcing its mission and values, the GE strategy and the GEP of ISER ensure and promote equality and diversity to knowledge and to the acquisition of skills to all personnel. The objectives of the GE strategy are implemented through specific actions that aim at safeguarding an equal and inclusive organizational culture and promoting gender-equality at all levels. As such, the GE strategy and the GEP will pro-actively enable gender equality, awareness raising, skills and competences; gender balance in decision-making structures and processes, including recruitment; gender equality in research; and integrating the gender dimension in the entire research process.

GENERAL PRINCIPLES

Each measure contained in this action plan is subject to the following principles:

- a) ***the principle of legality*** - involves carrying out activities to promote and implement the principle of equal opportunities and treatment between women and men, according to the provisions of the Constitution and national legislation, as well as the provisions of agreements and other international legal documents to which Romania is a party;
- b) ***the principle of respect for human rights and fundamental freedoms*** - implies respect for human dignity and mutual respect in social relations;
- c) ***the principle of non-discrimination and equal opportunities and treatment between women and men*** - implies non-discrimination and equal access for women and men to resources that guarantee them the free, full and unrestricted development of their life and personality on all levels;
- d) ***the principle of adequate financing*** - implies the allocation of the responsible use of financial resources for the implementation of the identified measures in order to achieve its objectives.

¹ https://cdn2.euraxess.org/sites/default/files/policy_library/ttf_goal_2_results_v1.0.pdf

² https://ec.europa.eu/info/policies/justice-and-fundamental-rights/gender-equality/gender-equality-strategy_en

³ <https://op.europa.eu/en/publication-detail/-/publication/ffc06c3-200a-11ec-bd8e-01aa75ed71a1>

DEFINITIONS AND CONCEPTUAL DELIMITATIONS

Equal opportunities - the concept according to which all human beings are free to develop their personal abilities and to choose without limitations imposed by strict roles; the fact that the different behaviours, aspirations and needs of women and men are equally considered, evaluated and favoured means that women and men enjoy the same freedom to achieve their aspirations.

Equality between women and men is seen as a human rights issue and a condition, an indicator of human-centered development and democracy" - European Institute for Equal Opportunities for Women and Men."⁴

Equal opportunities for women and men - refers to the absence of barriers to economic, political and social participation and equal treatment for women and men. Equal opportunities for women and men mean "taking into account the different abilities, needs and aspirations of males and females, respectively, and their equal treatment"⁵

Equal opportunities refer to the lack of barriers, explicit or implicit, for the economical participation, political, social and on gender criterions: "Such barriers are mostly indirect, difficult to distinguish, caused and maintained by the structural phenomena and by social representations that have been proven to be particularly resilient to change⁶.

Equal opportunities, as part of the gender equality objectives set, are based on the reasoning that a whole series of strategies actions, and measures is needed, to address deep-rooted and persistent inequalities."⁷

Equal opportunities for women and men - implies visibility, autonomy, responsibility and equal participation of both sexes in / in all spheres of public and private life.⁸

Equal treatment refers to the context in which there is no direct or indirect discrimination based on sex and gender, including no less favourable treatment of women on grounds such as pregnancy and maternity: "Favourable provisions for the protection of women with regard to pregnancy and maternity and positive measures to achieve substantial gender equality are not contrary to the principle of equal treatment."⁹

Equal treatment implies the absence of any form of discrimination. Acts of discrimination may come from the employer, from the employer's governing bodies or from other employees. Equal treatment, in employment relations, is based on the principle of equal treatment for all employees and employers¹⁰.

Gender pay gap (difference in pay) refers to the difference in average gross hourly earnings between female and male employees.¹¹

EIGE defines **gender equality** in terms of equal rights, responsibilities and opportunities for women and men, girls and boys: "Gender equality does not mean that women and men will become equal, but that their rights and responsibilities and opportunities will not depend on the birth as a woman or as a man." Gender equality requires that the interests, needs and priorities of both women and men be taken into account, thus recognizing the diversity of different groups of women and men. Gender equality is not an issue for women, but should be viewed and fully engaged by both men and women. Gender equality: in society, women and men do not have the same roles, resources, needs and interests. It does not participate equally in decision-making.

⁴ European Institute for Gender Equality (EIGE)

⁵ Romanian Law 202/2002

⁶ European Institute for Gender Equality (EIGE)

⁷ Idem 6

⁸ 1998 – Consiliul European, Abordarea integratoare a egalității de șanse între femei și bărbați

⁹ Idem 6

¹⁰ Romanian Labor Code, art. 5

¹¹ Idem 6

The values attributed to "women's work" and "men's work" are not the same; these differences vary from one society to another, from one culture to another and are called "gender differences".¹²

Gender mainstreaming - the key element used in the definition of gender mainstreaming is the emphasis on policy-making processes. The integrative approach refers to the (re)organization of the usual procedures and regulations, the (re)organization of responsibilities and capacities in order to integrate the gender perspective in all these procedures, regulations, responsibilities, capacities, etc. It also refers to the use of gender expertise in policy making and planning, the use of gender impact analysis in this process, the inclusion of consultations and the participation of relevant groups and organizations. Only when all these (pre) conditions are met, it can be stated that the process of the integrative approach is underway. "Gender mainstreaming is not only about promoting equality and going so far as to implement specific measures to help women, but also about mobilizing all policies and general measures specifically to achieve equality, taking into account actively and openly consider, at the project stage, the possible effects on the respective situation of women and men (gender perspective). This requires a systematic review of measures and policies and the consideration of such possible effects in their definition and implementation."¹³

REVIEW OF REQUIREMENTS, POLICIES AND CASE STUDIES

Prior to developing the GE strategy and the GEP, the management of the ISER appointed a working group to conduct a literature review of the existing requirements, policies, recommendations, examples and case studies pertinent to discrimination, inclusiveness and gender equality, with a special focus on research performing organisations (RPOs).

DIAGNOSIS (DATA COLLECTION AND ANALYSIS)

Data collection

The following indicators were selected at the ISER as relevant for the discussion on gender equality issues:

- Staff numbers by sex/gender at all levels, by domains, function (including administrative / support staff)
- Numbers of women and men in research and administrative decision-making positions (e.g., top management team, boards, committees, recruitment and promotion panels);
- Numbers of staff by sex/gender applying for/taking parental leave, for how long and how many returned after taking the leave.

• Table 1. WOMEN AND MEN IN LEADERSHIP POSITIONS

Leadership position	Woman	Man
Director		1
Chief Accountant	1	

¹² Idem 6

¹³ Idem 6

● **Table 2. WOMEN AND MEN RESEARCH STAFF , PER COMPARTMENT**

	Experienced researchers (CS I, CS II, CS III)	Early-stage researchers (CS and ACS)	Total women	Total men
Compartment of Biospeleology and Karst Edaphobiology	3 women + 5 men	1 woman + 1 man	4	6
Compartment of Geospeology and Paleontology	4 men	1 woman + 1 man	1	5
Compartment of Karstology, Cadastre and Karst Protection	2 women+ 4 men	1 man	2	5
Hidrogeochemistry Laboratory	1 man	-	0	1
Cluj Napoca Compartment	3 women+4 men	-	3	4
TOTAL WOMEN	8	2	10	
TOTAL MEN	18	3		21

● **Table 3. WOMEN AND MEN IN ADMINISTRATIVE AND SUPPORT SERVICES**

ADMINISTRATIVE AND SUPPORT SERVICES	Women	Men
Research technical support (Technical assistants)	1	3
Office administration support	4	3
TOTAL	5	6

As part of data collection and diagnosis, we conducted institute-wide surveys with the following indicators:

- Number of years needed for women and men to make career advancements
- Numbers of women and men candidates applying for distinct job positions
- Numbers of staff by sex/gender applying for/taking parental leave, for how long and how many returned after taking the leave
- Opinions on the work-life balance in the research institute
- Integration of the gender dimension into research content
- Perception of gender-based violence, including sexual harassment in the research institute
- Perception (opinion) regarding inclusiveness and discrimination at the research institute

QUANTITATIVE ANALYSIS OF DATA

The analysis of numerical data illustrated that:

- On average, the number of women and men in leadership and executives positions at administrative levels is approximately equal.
- The ratio of men/women in research positions, i.e., experienced researcher and early-stage researcher, is slightly in favor of men (66% compared to 34 %), reflecting the fact that the speleology is a synthesis field, that requires geologists, biologists, geographers, and chemists, and especially the students who graduated geology are men, but biologists are in the same proportion.

QUALITATIVE ANALYSIS OF DATA

The qualitative research showed that the women at our institute have always managed to successfully combine work and family life, being available for national and international mobility and for holding leadership positions

There is a continuous support for parents (especially mothers) in the growing periods of children to properly balance their parents' requirements with the work issues (e.g. flexible working time, work from home days)

The gender dimension is yet well integrated in research

Stereotypes and unspoken biases regarding gender doesn't exist in ISER, such as beliefs that women are less ambitious, less talented, or that they are less often considered experts, while men are more determined and resistant to stress

The strategies of the departments are rather unclear – cases are handled covertly; departments do not communicate that they act on gender equality, in any way

To summarize the results of the studies, it can be noted that all the situations mentioned by the respondents and situations analysed at the institute are, to some extent, factors of discrimination or manifestations based on gender.

However, the important conclusions of the internal analysis at the “Emil Racovita” Speleological Institute of Romanian Academy are:

- We need to revisit the existing policies and procedures, to make gender relevant, and develop new ones covering all identified areas of intervention
- We need to train and educate our staff on gender-equality
- We need to communicate gender relevant actions and measures actively and efficiently
- We need to develop a gender strategy and a GEP for 2024-2026, with clear actions and targets, and responsible persons

GE STRATEGY & GEP

Due to lack of staff, the “Emil Racovita” Speleological Institute management decided to give the attributions of GE officer in the charge of responsible of human resources (HR). Specifically, HR has to contribute to setting up, implement, monitor and evaluate the GEP; provide practical support and tools to the actors involved in the GEP implementation; raise awareness about the benefits of gender equality in the research institute; assess the progress towards gender equality in the institute.

GE STRATEGY 2024-2026

The GE Strategy comprises the following areas of intervention and objectives for 2024-2026:

Area of intervention <i>(These areas are those 'recommended' by Horizon Europe for GEP. They should be used in the GEP, however other areas may be considered, as needed)</i>	Objective(s)
1. Work-life balance and organisational culture	Promoting integration of work with family and personal life
2. Gender balance in leadership and decision-making	Promoting gender equality in the institutional culture, processes and practice
3. Gender equality in recruitment and career progression	Promoting processes to favour and support gender-sensitive recruitment, career and appointments
4. Integration of the gender dimension into research content	Promoting a gender and sex perspective in research process Promoting the integration of a sex and gender perspective in research activity
5. Measures against gender-based violence, including sexual harassment	Raising awareness about the importance of equality issues and strengthening positive attitudes towards diversity

GE PLAN 2024-2026

The ISER GE Plan comprises areas of intervention, objectives, key measures, target audience, timeline, responsible persons, and indicators to measure progress.

Area 1. Work-life balance and organisational culture

Objective: Promoting integration of work with family and personal life

Action/Measure	Target	Timeline			Indicator(s)	Responsible
		2024	2025	2026		
Availability of policies, procedures and structures at the research institute for promoting integration of work with family and personal life	Researchers, technical and administrative staff	X	X	X	Policies, procedures and services for work and personal life integration	D, HR, HoDs, GE officer
Feasibility plans for the creation of new welfare services, e.g., contract arrangements made by the research institute with service suppliers from family care duties and house chores to child-care (elderly-care) in case of conference or congress, or international mobility	Researchers, technical and administrative staff	X	X	X	Policies, procedures, and services for work and personal life integration	D, HR, HoDs, GE officer
Implementation of ICT-based systems for enhancing flexibility and improving a better planning of working meetings accordingly to work life balance needs (e.g., management and communications of the meeting schedule/timing)	Researchers, technical and administrative staff	X	X	X	Standard procedure for ICT-based systems promoting work and personal life integration	D, HR, HoDs, GE officer, IT services
Availability of flexible working times arrangements, from part-time to remote working	Researchers, technical and administrative staff	X	X	X	Policies, procedures and services for work and personal life integration	D, HR, HoDs, GE officer

Area 2. Gender balance in leadership and decision-making

Objective: Promoting gender equality in the institutional culture, processes and practice

Action/Measure	Target	Timeline			Indicator(s)	Responsible
		2024	2025	2026		
Appointing delegates in departments/centres, with a proactive and/or consultant role to be responsible for monitoring and ensuring that workplace procedures and practices respect gender equality	Researchers, technical and administrative staff	X	X		Gender equality policy and structures	D, HR, GE officer, HoDs
Routine revision of any text, communication, images, from a gender equality and diversity standing point	Researchers, technical and administrative staff	X	X	X	Policies, procedures and services for work and personal life integration	HR, GE officer, HoDs
Promotion of initiatives to facilitate a widespread gender competence at all levels of the organization with provision of training to staff and researchers	Researchers, technical and administrative staff	X	X	X	Awareness training on gender equality issues	HR, GE officer, HoDs

Area 3. Gender equality in recruitment and career progression

Objective: Promoting processes to facilitate and support gender-sensitive recruitment, career and appointments

Action/Measure	Target	Timeline			Indicator(s)	Responsible
		2024	2025	2026		
Carrying out gender awareness initiatives, briefings and creating guidelines for gender-sensitive recruitment, career and appointments	Research institute management	X	X	X	Gender awareness initiatives and guidelines	D, HR, HoDs, GE officer
Courses and training on gender equality	Researchers, technical and administrative staff	X	X	X	Courses and training for career progression and for leadership	D, HR, HoDs, GE officer,
Disseminate and communicate career good practices - role models for women (scientists, researchers and academics)	Researchers, technical and administrative staff		X	X	Initiatives for raising awareness on female role models	HR, GE officer, HoDs

Area 4. Integration of the gender dimension into research content

Objectives: Promoting a gender and sex perspective in research process & the integration of a sex and gender perspective in research activity

Action/Measure	Target	Timeline			Indicator(s)	Responsible
		2024	2025	2026		
Internal training seminars on the use of sex and gender perspective in research, to foster the acknowledgment of its economic, social and innovation value	Researchers, scientific community	X	X	X	Participation in training seminars on integrating sex/ gender analysis methods, by gender and field of research	SC, HR, HoDs, Researchers, GE officer
Development, communication and implementation of standards for the incorporation of the sex and gender variables into research	Researchers	X	X	X	Participation in training seminars on integrating sex/ gender analysis methods, by gender and field of research	SC, HR, HoDs, Researchers, GE officer
Institutional recognition within the research institute of those projects that have taken the gender dimension into account. (e.g., prizes)	Researchers, scientific community	X	X	X	Awarded projects	SC, HoDs, Researchers
Disseminate and communicate career good practices - role models for women (scientists, researchers and academics)	Researchers, technical and administrative staff	X	X	X	Policies, procedures and services for work and personal life integration	SC, HR, GE officer, HoDs
Workshops on the integration of gender equality and diversity issues in research activity, as support for research staff	Researchers	X	X	X	Initiatives for raising awareness on female role models	D, HR, SC, GE officer
Courses and training tools in all departments and at all levels (experienced or early researchers) on sex and gender variables	Researchers	X	X	X	Courses on specific gender dimensions, per research activity (department)	SC, HR, HoDs, GE officer

Area 5. Measures against gender-based violence, including sexual harassment

Objective: Raising awareness about the importance of equality issues and strengthening positive attitudes towards diversity

Action/Measure	Target	Timeline			Indicator(s)	Responsible
		2024	2025	2026		
Training on discrimination phenomena (including discriminatory language), violence (including that based on prejudice or gender), harassment, and sexual harassment	Researchers, technical and administrative staff	X	X	X	Participation in training, per categories	D, HR, HoDs, GE officer
Develop internal (institute) electronic tool (website/platform) supporting information and education, as well as allowing the reporting of sexual harassment	Researchers, technical and administrative staff	X	X	X	Dedicated research institute website/platform, number of visits, number of real-case situation reported and solved	D, HR, HoDs, GE officer, IT services
Reinforce de Code of Ethics of the institute with provisions against gender-based violence, including sexual harassment and discrimination	Researchers, technical and administrative staff	X	X	X	Initiatives for raising awareness on female role models	D, HR, HoDs, GE officer
Awareness campaign highlighting diversity and inclusiveness in the scientific community and encouraging prevention of discrimination in various areas	Researchers, technical and administrative staff	X	X	X	Awareness campaign	HR, GE officer

MONITORING AND EVALUATION OF THE GEP

The implementation of the GEP at the “Emil Racovita” Speleological Institute of the Romanian Academy, the progress against the GE strategy aims and objectives will be assessed, through periodic meetings. The implementation of the GEP will be permanently monitored by the GE functions at the institute.

The GE officer (HR) together with the GE delegates within each department are responsible with collecting data and input. They will perform a first analysis of the progress of the GEP (against the indicators), gather knowledge and feedback.

The GE functions at the institute will conclude findings reports (once a year), which are then presented to the research institute management (D, HoDs) and discussed. These meetings will provide valuable conclusions on the implementation of the GEP. These meetings will also provide comments and recommendations that will enable adjustments and improvements to interventions on the GEP for the following year.

The periodic reports allow the continuous review of the impact of the GEP as well as keeping the wider community informed and engaged in the progress towards gender equality. The review of progress reports includes qualitative information as well as quantitative data, such as updates on human resource data disaggregated by sex, monitoring data to keep track of the implementation of key actions.

After their conclusion and adoption by the research institute management (SC, GD, HoDs), the periodic (annual) GE progress report is published on the research institute website and communicated to the entire scientific community.

LIST OF SOURCES USED FOR THE LITERATURE REVIEW

(in alphabetic order)

Council of Europe Gender Equality Commission,

<https://www.coe.int/en/web/genderequality/gender-equality-commission>

EU FESTA - Gender Issues in Recruitment, Appointment and Promotion Processes – Recommendations for a Gender Sensitive Application of Excellence Criteria,

EU Strategy for Gender Equality 2020-2025, https://ec.europa.eu/info/policies/justice-and-fundamental-rights/gender-equality/gender-equality-strategy_en

EUA - Universities' Strategies and Approaches towards Diversity, Equity and Inclusion, <https://eua.eu/downloads/publications/universities-39-strategies-and-approaches-towards-diversity-equity-and-inclusion.pdf>

EUCEN - Diversity, Equity and Inclusion in European Higher Education Institutions, https://eua.eu/downloads/publications/web_diversity%20equity%20and%20inclusion%20in%20european%20higher%20education%20institutions.pdf

European charter & code of conduct for the recruitment of researchers,

https://cdn2.euraxess.org/sites/default/files/policy_library/ttf_goal_2_results_v1.0.pdf
European Institute for Gender Equality, <https://eige.europa.eu>

GARCIA – Mapping organizational work-life policies and practices, https://eige.europa.eu/sites/default/files/garcia_report_mapping_org_work-life_policies_practices.pdf

Guidelines for using gender-sensitive language in communication, research and administration, https://eige.europa.eu/sites/default/files/reutlingen_university_guidelines_for_using_gender-sensitive_language.pdf

Horizon Europe General Annexes, https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/wp-call/2021-2022/wp-13-general-annexes_horizon-2021-2022_en.pdf

Horizon Europe guidance on gender equality plans, <https://op.europa.eu/en/publication-detail/-/publication/ffcbo6c3-200a-11ec-bd8e-01aa75ed71a1>

LERU - Equality, diversity and inclusion at universities: the power of a systemic approach, <https://www.leru.org/publications/equality-diversity-and-inclusion-at-universities>

Science Europe - Practical Guide TO Improving Gender Equality in Research Organisations, https://eige.europa.eu/sites/default/files/se_gender_practical-guide.pdf

Student evaluations of teaching (mostly) do not measure teaching effectiveness, https://eige.europa.eu/sites/default/files/science_open_research_student_eval_teaching_effectiveness.pdf